

QUICK START GUIDE

Montana Teachers' Retirement System

EMPLOYER INSURANCE DEDUCTION SYSTEM





Overview

- This **Quick Start Guide** is a brief overview on using the new **Employer Insurance Deduction System**.
 - Monthly Access Timeframes
 - Access the Login Page
 - Welcome Screen
 - Online Help
 - Deduction Reports
 - Updates
 - Master Deduction Codes
 - Recipient Deductions
- Detailed help for the Insurance Deduction System is available via a new Online Help manual after you login.



Monthly Access Timeframes

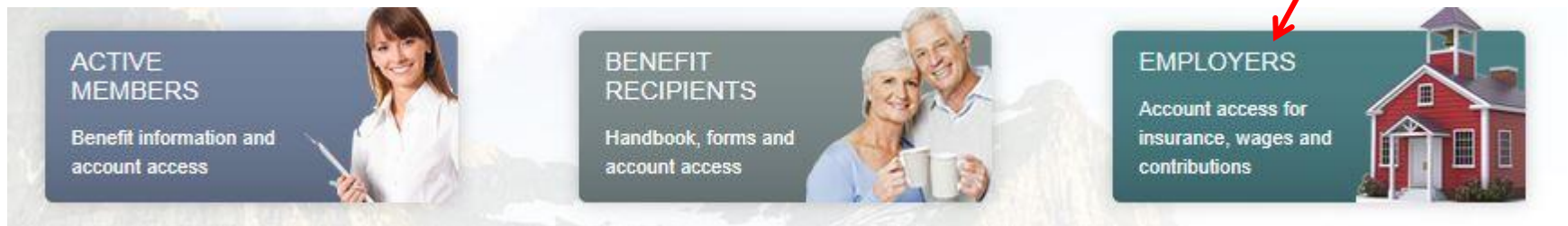
- **Open Period**
 - You can **update** information in the system through 11:59 p.m. on the 16th of each month.
- **Lockout Period**
 - You **cannot make any changes** to information in the system between the 17th and 28th of each month.
- **View Period**
 - You can **view** information and run reports any day of the month.



Login Access: Step 1



1. Click on **Employers** on the home page of the TRS website.
 - The link is located on the top of the home page or on the left hand menu.
2. Scroll down to the **Employer Reporting to TRS** section
3. Click on **Insurance Deduction System** link



Employer Reporting to TRS

- [Insurance Deduction System](#) ←
- [Wage & Contribution Reporting System](#)
- [TRS Contribution Rates, Interest Rates, and Median Average Salary Charts](#)



Login Access: Step 2

- *Login* with the Username and Password to your new TRS Online Services Account.

The screenshot shows the TRS Account Security page. At the top, there is a navigation bar with links for 'ONLINE MANUAL', 'EMPLOYER LOGIN', and 'TRS SEARCH'. Below this is a banner for the 'Montana Teachers' Retirement System'. The main section is titled 'TRS Account Security' and contains a 'Login' section. The 'Login' section has two tabs: 'Existing User' and 'New User'. The 'Existing User' tab is active and contains fields for 'Username' and 'Password', a checkbox for 'I would like to edit my account information after login', a 'Login' button, and a link for 'Forgot your Username or Password?'. The 'New User' tab contains a message 'Create a TRS account by selecting the button below:' and a 'Create' button.

- Click the **Online Manual** link on the top bar of the TRS Account Security Link for help with:
 - Creating a new account
 - Logging in

Welcome Screen



- Be sure to *review* the **Welcome Screen**
- Click on **Continue** to enter the Insurance Deduction System

ONLINE MANUAL [REDACTED] LOGOUT TRS SEARCH

TRS Employer Insurance Deduction System

Employer 999932 TRS TEST EMPLOYER

Welcome [REDACTED]

This service is for authorized TRS Employers Only

IF YOU ARE NOT A TRS EMPLOYER OR TRS STAFF, DISCONNECT NOW!

WARNING: It is a Montana State and Federal offense to:

- Obtain access to data without authority
- Damage, delete, alter or insert data without authority

The employer is responsible to ensure that all users are trained and comply with all applicable requirements in the handling, use and disclosure of confidential information, and in access to and use of TRS and State of Montana data systems.

Need help using this system? Click the Online Manual link at the top of any screen.

REMINDER: The benefit recipient and you are required to complete an initial [Authorization For Deduction of Health Insurance form](#) and submit this form to TRS. A TRS staff member will then update the TRS Employer Insurance Deduction System, which will allow you to commence withholding insurance premiums on behalf of the benefit recipient.

[Continue](#)

Online Help



- TRS has created a new **Online Manual** for the Insurance Deduction System.
- The manual will walk you, step-by-step, through each aspect of the system.

ONLINE MANUAL [REDACTED] LOGOUT TRS SEARCH

Montana Teachers' Retirement System

TRS Employer Insurance Deduction System

Master Deduction Codes

999932 TRS TEST EMPLOYER

Insurance Employer 999932 TRS TEST EMPLOYER

All changes affect TRS August payroll on the last day of August except for future-dated deductions.

Deduction Code	Premium	Effective	Description	Hist	+
001	1,186.00	09/01/2013	MDV Retiree/Spouse		
002	328.00	09/01/2013	MDV Medicare Eligible Retiree		
003	655.00	09/01/2013	MDV Retiree		

Online Help



- When you *click* on the **Online Manual** link, the manual opens in its own window. You can keep the window open for further reference or you can close it when you have found the information you need.

TRS Employer Insurance Deduction System **Online Manual**

Contents | [Index](#) | [Search](#)

Employer Insurance Deduction System Online Manual

- System Overview
- Logging In and Monthly Access Timeframes**
- Welcome Page and Menu
- Recipient Deductions
 - Deduction Procedures and FAQs
 - Error and Warning messages for Recipient Deduction changes
- Master Deduction Codes
 - Managing Master Deduction Codes
 - Error and Warning messages for Master Deduction Code changes
- Employer Contact
- Deduction Reporting
- Additional Users
- Change Employer - TRS Staff Access

Logging In and Monthly Access Timeframes

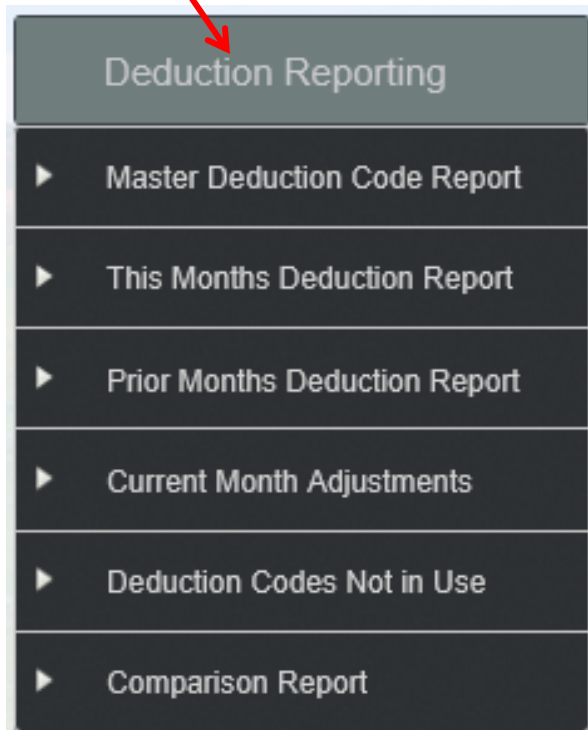
When you select any topic in the Table of Contents...

...the content displays in this pane.



Deduction Reports

- TRS recommends you *review* your existing data before making any changes.
 - Click **Deduction Reporting** in the left hand menu to see a list of report options.



- The Online Manual includes tips for viewing and printing reports.

- You can run as many reports as you need to – as many times as you like.
- Reports are created in PDF.

Updates



- Step-by-step instructions are provided in the Online Manual for updating Master Deduction Codes and Recipient Deductions.

TRS Employer Insurance Deduction System

Deduction Summary

81 K-12 SCHOOL

Insurance Employer: 1 K-12 SCHOOL

Web Enabled Recipients: With Deductions ☒ All ☐ Inactive TRS Benefits ☐

Last Name: (beginning letters) Search

Deduction Code:

All changes affect TRS July payroll on the last day of July except for future-dated deductions.

Deduct Code	Table/Adjust	Premium	Begin Period	End Period	Description	Detl	Hist	Add/Edit	Term
0					Member			+	
002	Table	299.00	07/01/2009						
5					Member			+	
001	Table	293.00	06/01/2014						
002	Table	299.00	07/01/2009	05/31/2014					

Remember: All changes affecting the current TRS payroll month must be entered on or before 11:59 p.m. on the 16th of the month.

Questions?



- If you have questions that can't be resolved by reviewing the Online Manual, the TRS staff will be happy to help you.
 - (406) 444-3134
 - (866) 600-4045

